

Getting Ready for Mid-Year Performance Discussions

It's time for you and your manager to look at what you've accomplished since the beginning of the year and what you plan to do in the remainder. In other words, the mid-year discussion combines the elements of both goal-setting and appraisal discussions.

This discussion should summarize accomplishments to date, identify what goals have been added, eliminated or changed, review priorities and clarify performance expectations going forward.

Employee Guidelines

Prepare a list of your accomplishments and progress to date.

- Provide your manager with current information on your accomplishments starting from when goals were set.
- Prepare for the discussion—what you have accomplished to date against your goals and what you would like to accomplish.

Meet and discuss performance to date.

- Ask for feedback from your manager on what you are doing particularly well, and what you might improve upon.
- Provide your manager with specific examples of what you've done particularly well and where you would like to improve.
- Make the discussion easier by asking questions like, "What else could I have done to improve X" or "Do you have any suggestions for me?". Then listen carefully.

Discuss what you plan to achieve by the end of the fiscal year, and ask what your manager expects you to achieve in this timeframe.

- Make sure you get all the information you need by making sure your goals are SMART(er). If you walk away unsure of what is required, you haven't gotten the clarity that you need.
- Make your manager aware of any issues or roadblocks you are facing and discuss how they might be overcome. Let your manager know what you need from him/her during the remainder of the fiscal year to be successful.

Discuss your development activities for the year.

- Share progress you have made toward your own development plan with your manager.
- Find out how your manager can support you in accomplishing your development goals for the year.

Complete the discussion

- Thank your supervisor for their feedback. Recommit yourself to a successful year.

Manager Guidelines

Schedule a meeting

- Ask your employees to come prepared to discuss the major accomplishments achieved so far and their priorities for the rest of the year.

Prepare for the mid-cycle status review.

- Review your files of what has been accomplished to date. It helps to maintain an updated file for each of your direct reports.

Meet and discuss performance to date.

- Share with the employee what goals you think they have done effectively so far this year. Also, tell the employee what goals you'd like them to focus on for the rest of the year.
- Provide specific, behavioral examples of what the employee is doing particularly well, and examples of anything that needs to change.
- Ask the employee how the job is going. Questions like "What's going well?" and "What needs to be improved?" can foster a productive conversation about the work and their performance.

Discuss your expectations — and the employee's expectations — about what the employee should accomplish by the end of the year.

- Agree on how goals should be prioritized for the remainder of the fiscal year.
- Ensure a shared understanding of performance expectations to minimize unpleasant surprises at the year-end performance review.
- Find out what challenges or roadblocks are faced by the employee. Ask how you can help eliminate roadblocks, and then follow through.

Complete the discussion

- Thank the employee for their hard work and encourage them in their work for the remainder of the year.
- Document the discussion and give a copy to the employee.